

Jedox Models: Sales

Kick-start your integrated sales planning



Make every customer interaction count

The digital age has liberated buyers and opened many new market opportunities. Buyers are better informed. You must be too. If standard CRM reports or spreadsheet solutions can't provide the complete picture you need, it's time to take your sales planning, analysis and reporting to the next level with Jedox.

The Jedox Sales Model delivers the information you need to understand your customers and sell more effectively. You'll gain a complete view of your current performance and new insights to drive sales across the organization.

Plan your success with Jedox

Jedox Sales delivers tailor-made dashboards, real-time analytics and rich planning capabilities that simplify complex sales processes. This prebuilt, ready-to-use module packs powerful Business Intelligence and CPM technology in a familiar Excel environment. Since you don't start your project from scratch, the costs and risks are minimal. Best of all, you see results fast.

The Jedox Sales Model combines vast project and industry experience into prebuilt content, including:

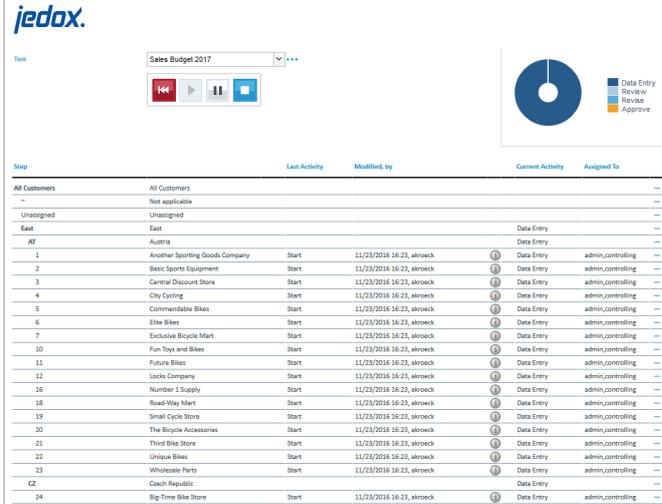
- ▶ Preconfigured standard reports (e.g. sales commission, costs and contribution margin)
- ▶ Smart business logic (e.g. for driver-based planning)
- ▶ Easy-to-use Web screens to flexibly enter sales
- ▶ High data security through effective access management

Be agile

Time is money. The Jedox Sales Model kick-starts your project for fast results and minimal risk. Adapt the application flexibly to your company's changing requirements. No programming skills are required.

Jedox supports companies of all industries and sizes. The software is easy to deploy and use – in the cloud or on premises.

Jedox simplifies the way you plan, analyze and report sales data to create a complete, 360-degree view of your sales activities. Use its built-in capabilities to collect budget data through intuitive data entry screens and compare planned performance to actual sales. Test multiple scenarios to respond quickly and effectively to today's dynamic markets.



Step	Last Activity	Modified, by	Current Activity	Assigned To
All Customers	All Customers			
	Not applicable			
Unassigned	Unassigned			
East	East		Data Entry	
AT	Austria		Data Entry	
1	Another Sporting Goods Company	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
2	Basic Sports Equipment	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
3	Central Discount Store	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
4	City Cycling	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
5	Commandable Bikes	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
6	Elite Bikes	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
7	Exclusive Bicycle Mart	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
10	Fun Toys and Bikes	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
11	Future Shop	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
12	Locks Company	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
16	Number 1 Supply	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
18	Road-Way Mart	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
19	Small Cycle Store	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
20	The Bicycle Accessories	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
21	Third Bike Store	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
22	Unique Bikes	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
23	Wholesale Parts	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
CZ	Czech Republic		Data Entry	
24	Big-Time Bike Store	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling
25	Bikes and Motorbikes	Start 11/23/2016 16:23, skroock	Data Entry	admin_controlling

Figure 1: Optimize sales through collaborative processes
The Jedox Sales model offers built-in status and workflow tools to support even complex sales organizations.

Scope of delivery: Jedox Sales

Reports

- » Actuals (cumulated and monthly views)
- » Mid-term planning
- » Gross earnings
- » Gross revenue
- » Commissions
- » Costs and contribution margins
- » Order backlog
- » Legal entity breakdown
- » Time series
- » Workflow administration
- » Forecast initialization

Business logic

- » Display of actuals in the forecast
- » Previous year's values displayed for budget-actual comparisons
- » Integration in other detailed budgets (e.g. P&L); optional
- » Semi-additive KPIs
- » Currency conversions: configurable for multiple base and target currencies

Database

- » Hierarchies by company
- » "Sales" data cube: version, day, company, article, customer, sales channel, currency
- » "Sales planning" data cube: version, month, company, article, customer, currency
- » "Order backlog" cube: version, day, company, article, customer, sales channel, currency, order status (order backlog, orders not yet invoiced, outstanding invoices)

Processes

- » Approval workflow with history, timestamp and summary for administrators
- » ETL interface to current exchange rates (ECB)
- » Batch processing from the OLAP database

Analyze your entire value-added chain



The Jedox Sales Model comes with preconfigured standard reports, business logic and databases that give you a decisive information advantage. Monitor your order backlog and analyze incoming orders, delivery, invoicing and payments in an

integrated application. Gain insights at every step of the value-added chain and take action based on reliable, current numbers. With Jedox, you can easily adapt the planning model to your changing business requirements – without the risk of changing the underlying logic.

Rely on your numbers



Jedox Sales provides fast, flexible access to all relevant information. Your sales organization can access the information it needs on its own without having to ask IT or wait for current data. Thanks to the intuitive

Excel environment, sales managers can generate their own reports based on a central, reliable base of daily updated information.

Analyze sales, units sold, discounts or contribution margin by sales rep, region, product or sales channel spontaneously and flexibly – even down to individual postings. Combine important information from Salesforce, SAP, MS Dynamics NAV or other CRM and ERP systems automatically with Jedox Integrator. Use a wide range of analytic capabilities to identify and tap new cross-selling and upselling opportunities.

Choose the detail you need



Jedox Sales provides comprehensive planning tools that support top-down and bottom-up approaches. Create any number of planning scenarios. Run what-if analyses to gauge the opportunities and risks, for

example, of restructuring sales regions or changing quota systems. From sales analysis to driver-based planning and forecasting, the integrated Jedox Model helps you efficiently manage and drive sales.

Optimize sales through collaborative processes



Say goodbye to long email trails and time-consuming copy and paste. The Jedox Sales model offers built-in status and workflow tools to support even complex sales organizations. Sales managers enter

data for individual sales reps through an intuitive Web screen. The intelligent permission management assigns relative actions to sales reps, who submit their budget data back to management for review and revisions or approval. The workflow logs all revision cycles including timestamps and comments for maximum transparency. This saves time so your sales can stay focused on more important tasks.

		PY	FC 3+0	ΔP%	2016 (entry)	BU	ΔFC 3+0%
All Articles		Gross Earnings	2,151,707	446,940	-79.2%	0	0
			7,395,292	1,581,924	-78.6%	0	0
Bikes		Gross Earnings	1,718,707	378,056	-78.5%	0	0
		Sales Commissions	13,414	3,392	-79.0%	0	0
		Delivery Charges	5,391	1,170	-80.3%	0	0
		Gross Profit	1,714,902	362,484	-78.5%	0	0
		Fixed Costs	27,542	7,454	-72.9%	0	0
		Net Profit	1,686,820	347,040	-78.6%	0	0
			7,395,292	1,581,924	-78.6%	0	0
Components		Gross Earnings	400,397	89,189	-82.3%	0	0
		Sales Commissions	2,259	539	-82.3%	0	0
		Delivery Charges	1,073	483	-55.0%	0	0
		Gross Profit	400,265	88,109	-83.0%	0	0
		Fixed Costs	1,717	417	-75.7%	0	0
		Net Profit	398,548	87,692	-83.0%	0	0
			7,395,292	1,581,924	-78.6%	0	0
Clothing		Gross Earnings	6,866	3,777	-45.0%	0	0
		Sales Commissions	140	51	-63.2%	0	0
		Delivery Charges	367	0	-100.0%	0	0
		Gross Profit	6,360	3,726	-42.3%	0	0
		Fixed Costs	19	19	-74.0%	0	0
		Net Profit	6,315	3,712	-42.2%	0	0
			7,395,292	1,581,924	-78.6%	0	0
Accessories		Gross Earnings	4,537	938	-79.3%	0	0
		Sales Commissions	49	9	-82.7%	0	0
		Delivery Charges	266	0	-100.0%	0	0
		Gross Profit	4,223	929	-78.0%	0	0
		Fixed Costs	20	6	-72.0%	0	0
		Net Profit	4,203	924	-78.0%	0	0

Figure 2: Jedox simplifies the way you plan, analyze and report sales data

Analyze sales, units sold, discounts or contribution margin by sales rep, region, product or sales channel - flexibly.

Why wait? Get started now.

The Jedox Sales Model is the easy, low-risk way to kick-start your project. Best of all, you can get started with no additional costs:

1

You don't already use Jedox? Start your free Jedox test phase (cloud or download)

2

Open Jedox Web and load the Jedox Model "Sales" to your installation under "Jedox Market-place" – at no cost or further obligation.

3

Start your sales planning with Jedox and configure the model to your business needs. Visit [Jedox Knowledge Base](#) for detailed instructions and tips.

Jedox Models – Planning made simple

Jedox Models are prebuilt components for building integrated planning, analysis and reporting processes. Instead of designing individual planning modules by scratch and trying to link them together, you simply customize them to your business requirements. This reduces risks and saves time in implementing planning solutions. Jedox Models

combine decades of hands-on project experience and best practices with state-of-the-art technology. Business users can easily configure Jedox using intuitive planning templates and workflows.

Benefits for your business



+ Simplify planning:

Preconfigured reports, workflows and business rules save valuable time throughout the planning process.

+ Reduce project risk with reliable models:

Jedox Models utilize trusted industry methods for planning P&L, Cost Center, Sales, and Human Resources. This helps ensure your planning project is a success.

+ Self-service solution:

Use your existing Excel skills and the intuitive Jedox Web interface to flexibly adjust the planning application on your own. No programming, external consultants, or IT specialists are necessary.

+ Well-founded decisions and optimized performance management:

Make informed business decisions and drive business performance with a better understanding of risks and opportunities.

+ Be flexible:

Adapt the planning model to your company and its changing requirements.

+ More accurate planning through better collaboration:

Jedox Models help you work more effectively with planners in Sales, HR and Logistics. You profit from more accurate results.

+ Avoid beginner's mistakes and set your sights on scalability:

Avoid time-consuming loops. Jedox Models use tried-and-tested modelling techniques to ensure fast results. You can add and integrate further modules to easily grow your planning application.

+ Fast project implementation:

Why build reports or planning models from scratch? Kick-start your project with Jedox Models.

About Jedox:

Jedox simplifies planning, analysis, and reporting with one unified cloud-based software suite. Jedox empowers decision-makers and business users across all departments to work smarter, streamline business collaboration, and make insight-based decisions with confidence.

Over 1,900 organizations use Jedox in 127 countries for real-time planning on the web, in the cloud, and on any device. Independent analysts Gartner, Howard Dresner and BARC recognize Jedox for its leading enterprise planning solutions. [Learn more: www.jedox.com](http://www.jedox.com)